

Lead Magnet Portal

User's Manual
Channel Partners



Table of Contents

Lead Magnet Portal	1
Screen 1 – Login Page	3
Screen 2 – Password Reset	4
Screen 3 – Access Dashboard	5
Screen 4 – User Management Overview	6
Screen 5 – Transfer Points	10
Screen 6 – Allocate New A-I-R-S Number	13
Screen 7 - A-I-R-S Number Allocation – Post Submission Process	15
Screen 8 – A-I-R-S Application Status	20
Screen 8 – Reports Summary (A-I-R-S Number Allocation Report)	22
Screen 9 – Reports Summary (Lead Magnet Points Transfer History Report)	25
Understanding the A-I-R-S Allocation Report (Screen 8)	28
Understanding the Points Transfer History Report (Screen 9)	28
Screen 10 – General Navigation Guide	29



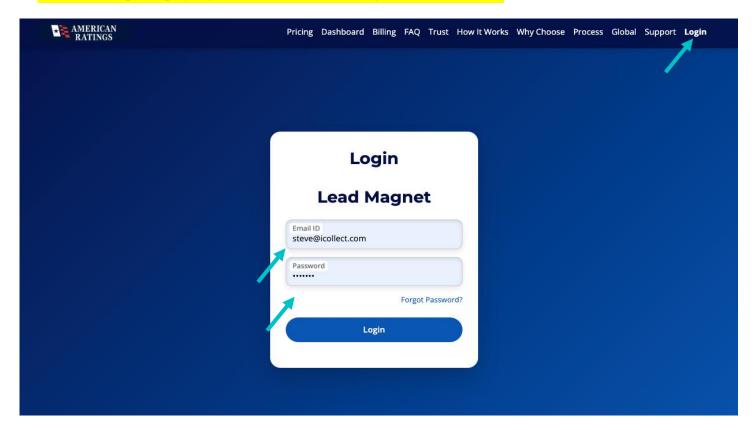
➤ Screen 1 – Login Page

Purpose: Securely access the Lead Magnet Partner Portal using your registered credentials.

Steps (Refer to Screen 1 below):

- 1. Click Login. (See Step 1 on Screen 1 below)
- 2. Enter your registered email and password. (See Step 2 on Screen 1 below)
- 3. Click Login to access your account. (See Step 3 on Screen 1 below)

Screen 1 – Login Page (Steps shown below to correspond to this screen)





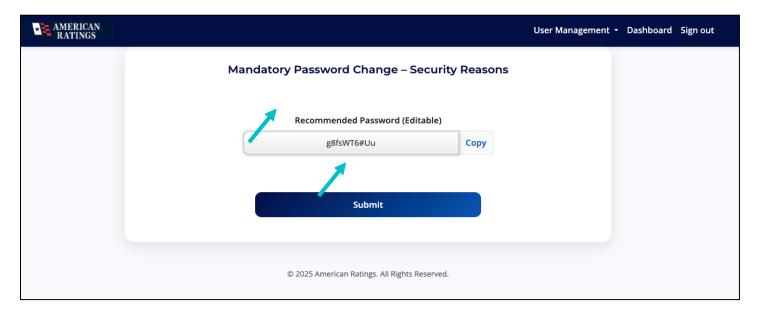
➤ Screen 2 – Password Reset

Purpose: Reset your password during first-time login or when required for security reasons.

Steps (Refer to Screen 2 below):

- 1. Enter your new password and confirm it. (See Step 1 on Screen 2 below)
- 2. Click Submit. (See Step 2 on Screen 2 below)
- 3. Once updated successfully, proceed to your Dashboard. (See Step 3 on Screen 2 below)

Screen 2 – Password Reset (Steps shown below to correspond to this screen)





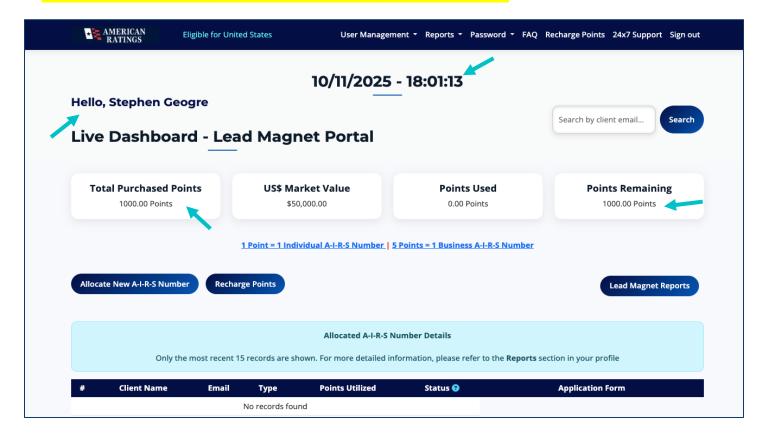
Screen 3 – Access Dashboard

Purpose: Navigate to the main control panel dashboard after logging in.

Steps (Refer to Screen 3 below):

- 1. Click Go to Dashboard. (See Step 1 on Screen 3 below)
- 2. The dashboard displays your name, date & time, total purchased points, and remaining points. (See Step 2 on Screen 3 below)

Screen 3 – Dashboard (Steps shown below to correspond to this screen)





Screen 4 – User Management Overview

Purpose: Manage internal users who can access and allocate A-I-R-S Numbers within your organization.

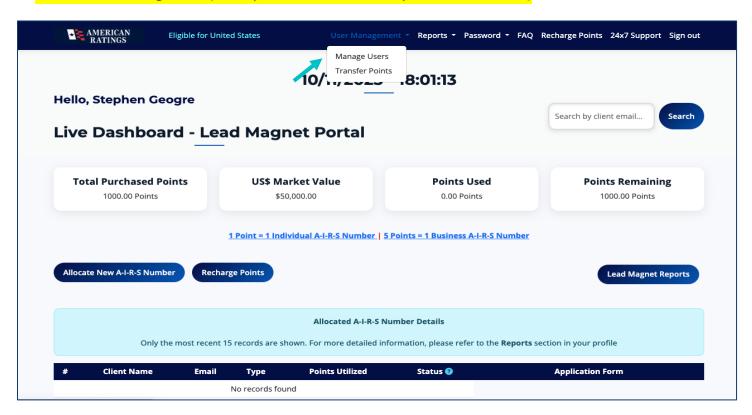
Path: User Management \rightarrow Dropdown \rightarrow Manage Users

Steps (Refer to Screen 4.1 to 4.4 below):

- 1. Click Manage Users to view or add internal users. (Step 1 on Screen 4.1 below)
- 2. Enter user details Name, Email, Contact Number, Designation and click on Add User (Step 2 on Screen 4.2 below)
- 3. The system automatically generates a password for the user. Share it for their first-time login. (Step 3 on Screen 4.3 below)
- 4. User is created, their details will be displayed on-screen. You can enable or disable a user anytime as needed. (Step 4 on Screen 4.4 below)

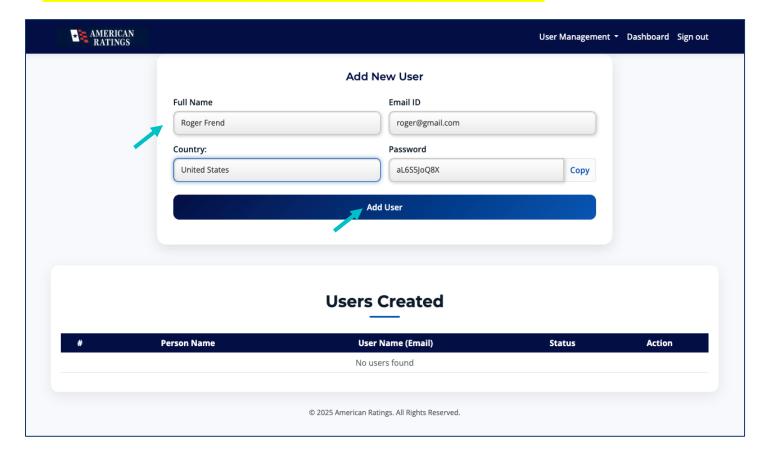
Note: Internal users are typically staff members responsible for managing A-I-R-S Number allocations.

Screen 4.1 – Manage User (All steps shown below correspond to this screen)





Screen 4.2 - Enter user details (Steps shown below correspond to this screen)





Screen 4.3 - Enter user details (Steps shown below correspond to this screen)

Success

New user **roger@gmail.com** has been added successfully.

Country Code: US

Country Name: United States

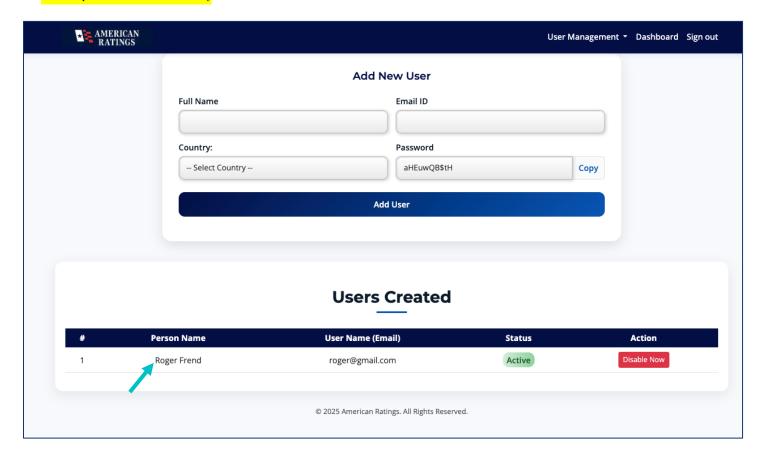
Email: roger@gmail.com Copy

Password: aL6S5JoQ8X Copy

Go to Manage Users



Screen 4.4 - Details will be displayed on the screen. You can enable or disable (Steps shown below to correspond to this screen)





Screen 5 – Transfer Points

Purpose: Transfer Lead Magnet Points to internal users for allocation tasks.

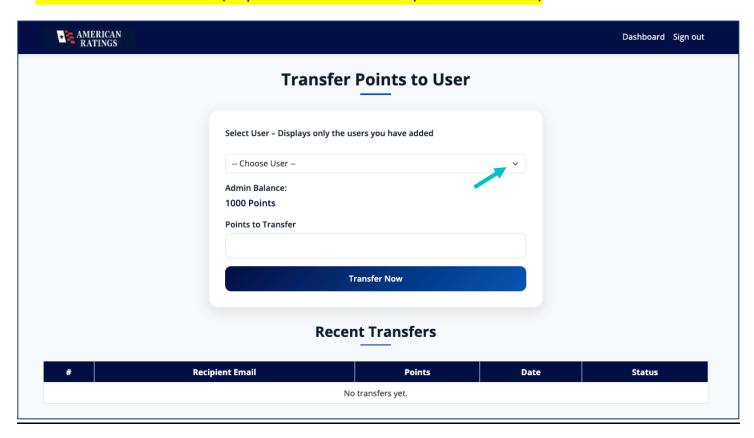
Path: User Management \rightarrow Dropdown \rightarrow Transfer Points

Steps (Refer to Screen 5.1 to 5.3 below):

- 1. Select the user to whom you wish to transfer points. (Step 1 on Screen 5.1 below)
- 2. Enter the number of points to transfer and click on Transfer Now. (Step 2 on Screen 5.2 below)
- 3. The updated points distribution will appear immediately on your dashboard with their credentials (Step 3 on Screen 5.3 below)

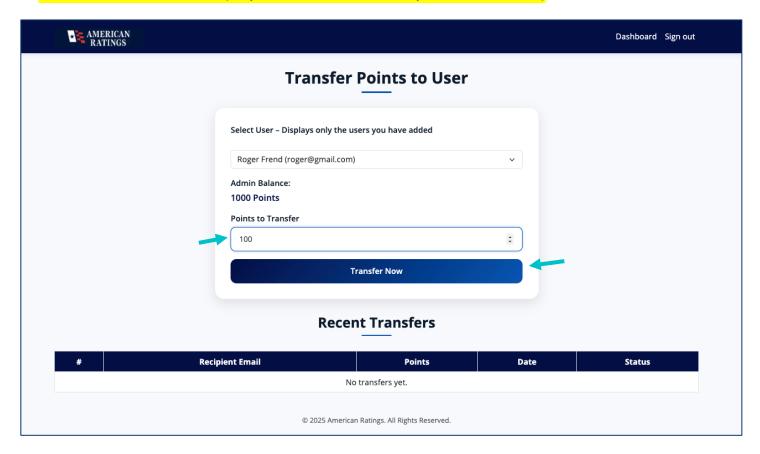
Example: When you transfer 100 points to user Roger Frend, both balances and transfer details update instantly.

Screen 5.1 – Transfer Points (Steps shown below to correspond to this screen)



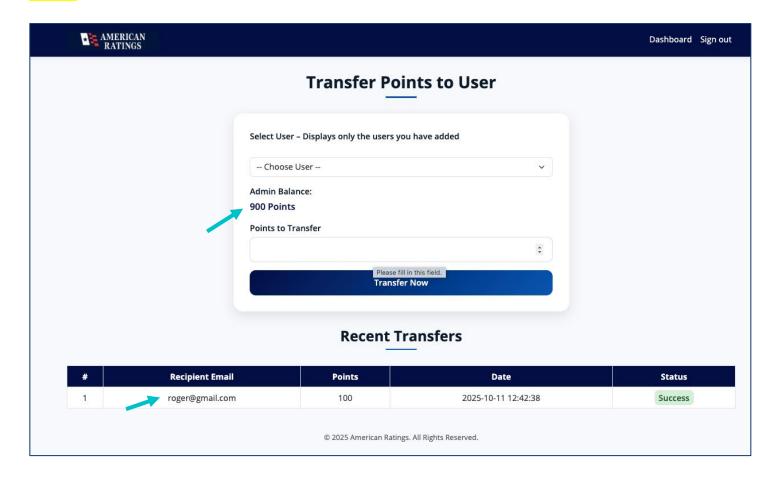


Screen 5.2 – Transfer Points (Steps shown below to correspond to this screen)





Screen 5.3 – Updated points distribution with User Credentials (Steps shown below to correspond to this screen)





Screen 6 – Allocate New A-I-R-S Number

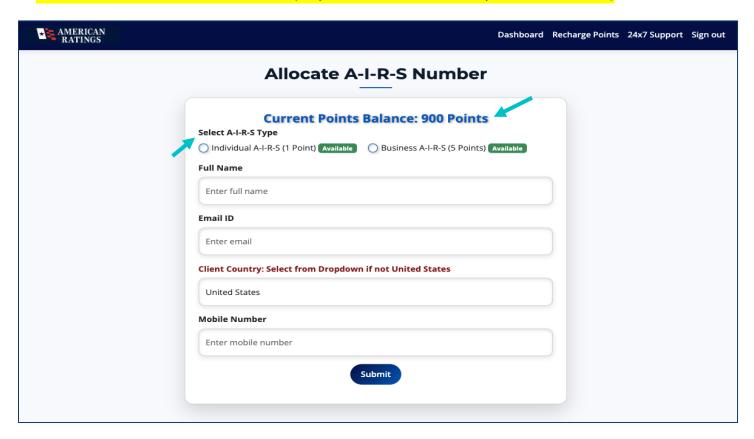
Purpose: Allocate A-I-R-S Numbers directly to clients without assigning them to any internal user.

Steps (Refer to Screen 6.1 to 6.2 below):

- 1. Choose the Certificate Type with total points—Individual or Business. (Step 1 on Screen 6.1 below)
- 2. Enter all required details accurately. (Step 2 on Screen 6.2 below)
- 3. The available points appear automatically. (Step 3 Screen 6.2 below)
- 4. Click Submit.

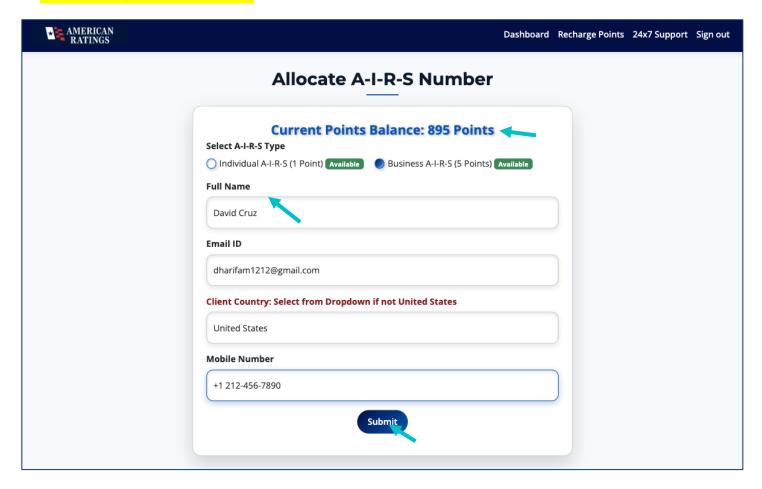
The client automatically receives an email and WhatsApp message with next-step instructions. (Refer to Screen 7 below)

Screen 6.1 – A-I-R-S Number Allocation (Steps shown below to correspond to this screen)





Screen 6.2 – All required details accurately with available points post selection of certificate (Steps shown below correspond to this screen)





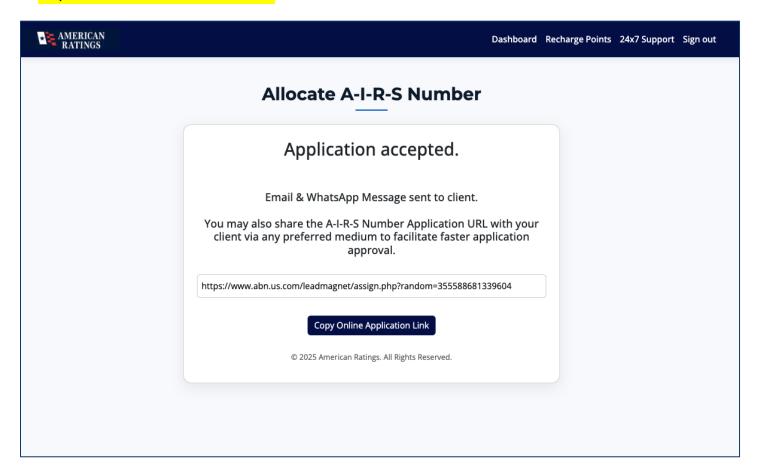
Screen 7 - A-I-R-S Number Allocation – Post Submission Process

Purpose: Understand what happens after the A-I-R-S application is allotted.

Once the internal staff or channel partner fills in and submits the applicant's details, the following process takes place:

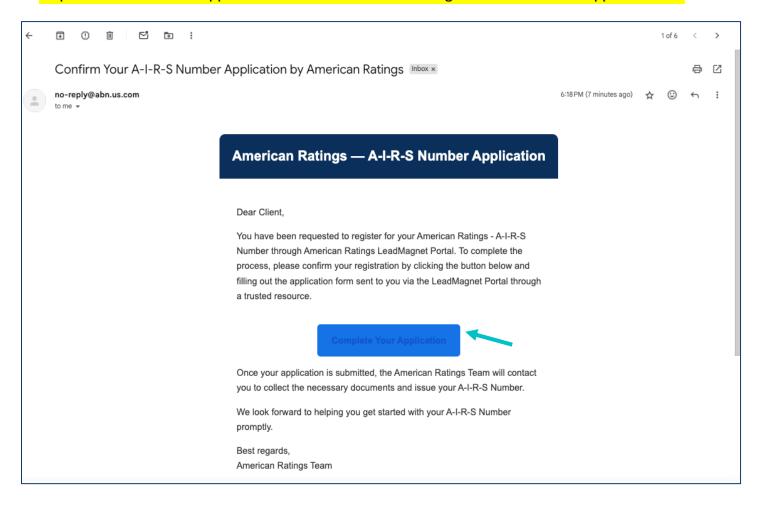
- Step 1 A confirmation screen appears stating "Application Accepted". Means the application details are sent to the client.
- Step 2 An email and WhatsApp message containing the A-I-R-S Number application link are automatically sent to the applicant.
- Step 3 The applicant must open the shared link and complete the required details in the online form.
- Step 4 Upon successful submission, the applicant's A-I-R-S Number status changes from Pending to Processing status and is updated in the system.
- Step 5 After the status changes to "Processing," the American Ratings Operation Team takes over the application review and verification process.

Step 1 - Allocator Screen Dashboard



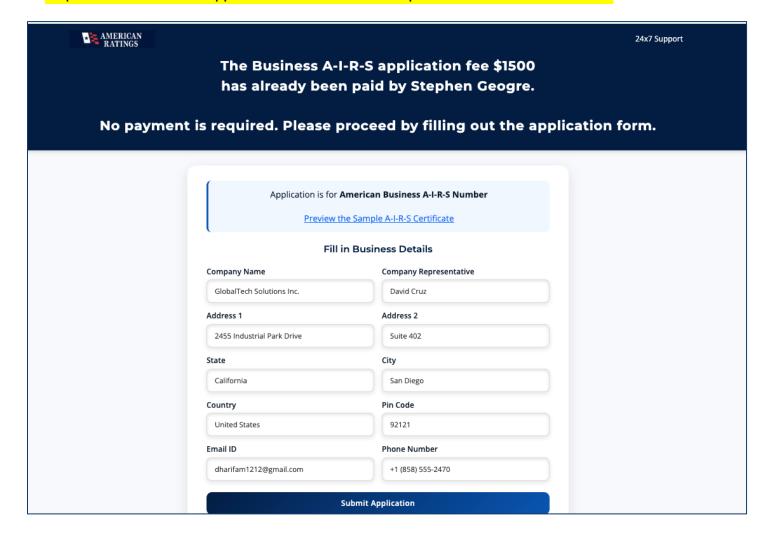


Step 2 – A-I-R-S Number Application Receiver Screen containing the A-I-R-S Number application link



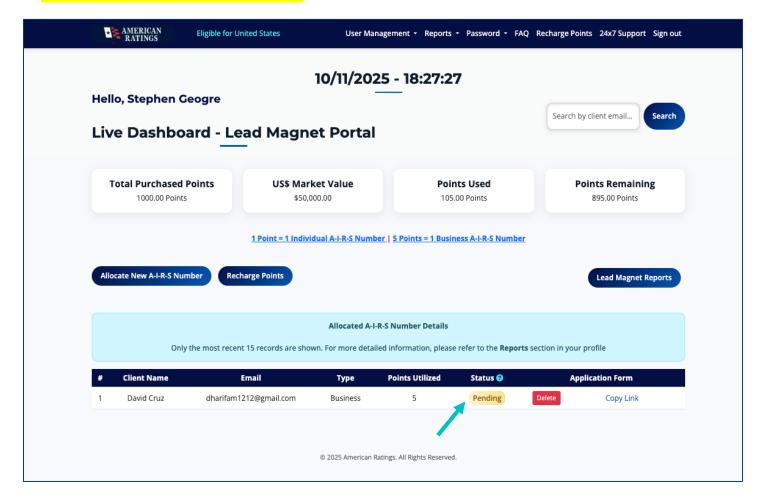


Step 3 – A-I-R-S Number Application Receiver Screen required details in the online form



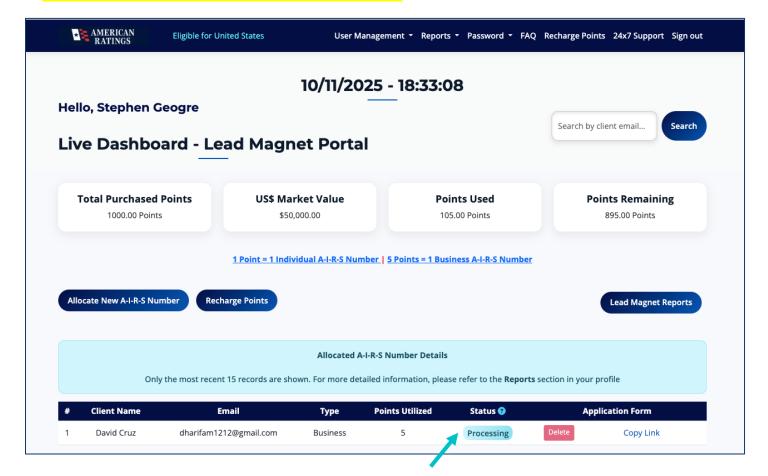


Step 4 – Allocator Screen Dashboard: The application status is Pending, indicating that the applicant has not yet submitted the required form details.





Step 5 – Allocator Screen Dashboard shows a PROCESSING status, indicating that the client has completed and submitted the application for their A-I-R-S number.





➤ Screen 8 – A-I-R-S Application Status

Purpose: Track each application's current stage.

Status Types (Refer to Screen 8 below):

1. Pending – Application Sent

The application for the selected A-I-R-S Number has been successfully sent and is awaiting the client to complete and submit the form.

2. Processing - App Accepted

The application for A-I-R-S Number has been accepted.

At this stage, the American Ratings Internal Operation Team reviews and processes the application. Within **6 working days**, the respective **A-I-R-S Number** will be assigned.

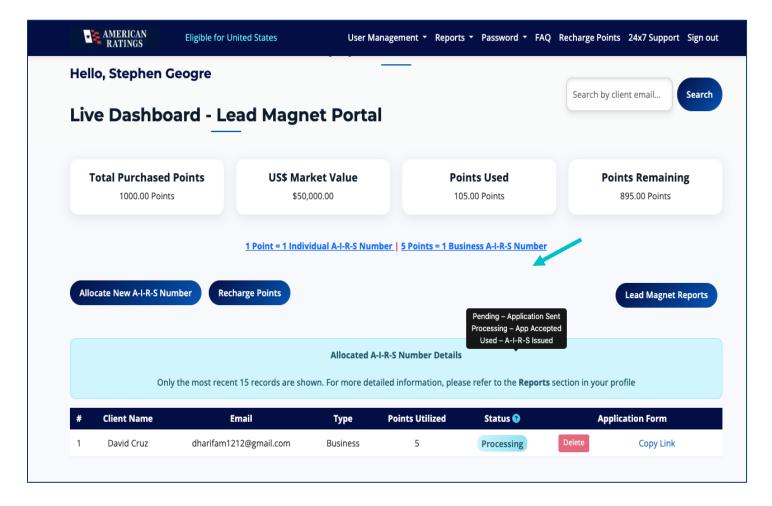
3. Used - A-I-R-S Issued

The respective A-I-R-S Number has been issued and activated for business use.

The **status on the dashboard** has also been updated to reflect this completion.



Screen 8 – Status Types (All steps shown below correspond to this screen)





Screen 8 – Reports Summary (A-I-R-S Number Allocation Report)

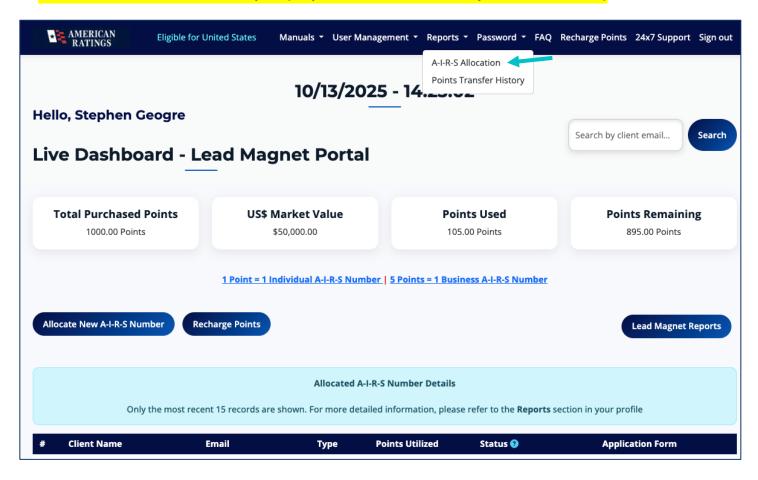
Purpose: To understand the functionality and operation of the Lead Magnet Portal Report Category.

Path: Dashboard \rightarrow Reports Dropdown \rightarrow A-I-R-S Allocation

Steps (Refer to Screen 8.1 to 8.3 below):

- 1. Click on Report and select A-I-R-S Allocation. (Step 1 on Screen 8.1 below)
- 2. The Report Screen will appear. Enter the required details, such as Select User / Channel Partner, Status, Start Date, and End Date, then click Generate Report (Step 2 on Screen 8.2 below)
- 3. The system will generate the report in PDF format based on the provided inputs (Step 3 on Screen 8.3 below)

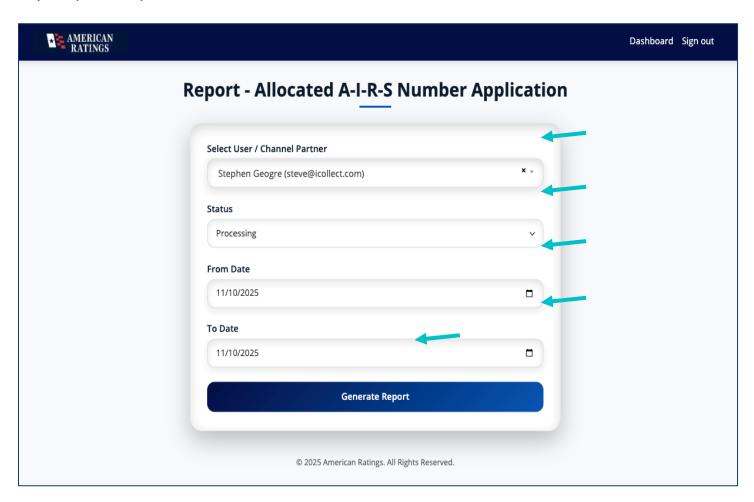
Screen 8.1 – A-I-R-S Allocation Report (Steps shown below to correspond to this screen)





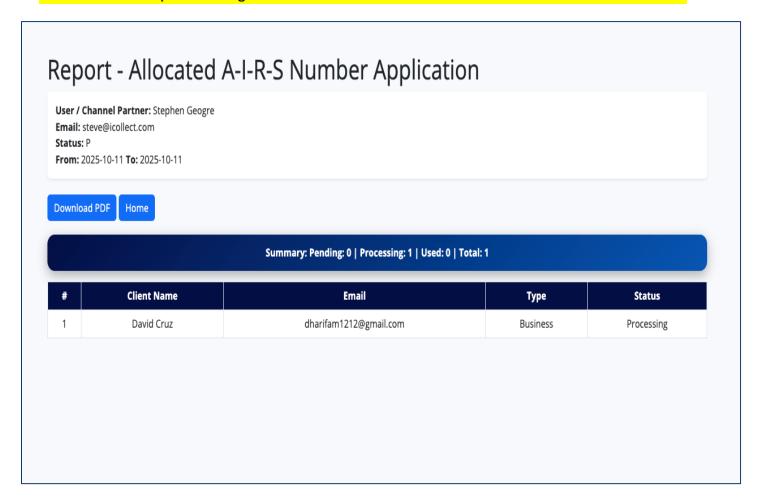
Screen 8.2 – A-I-R-S Allocation Report fields are displayed based on the respective user credentials. (Steps shown below to correspond to this screen)

Note – The given credentials are for illustration purposes only. You can select the required fields based on your specific requirements.





Screen 8.3 - The report will be generated and can be downloaded in **PDF format** for internal use.





Screen 9 – Reports Summary (Lead Magnet Points Transfer History Report)

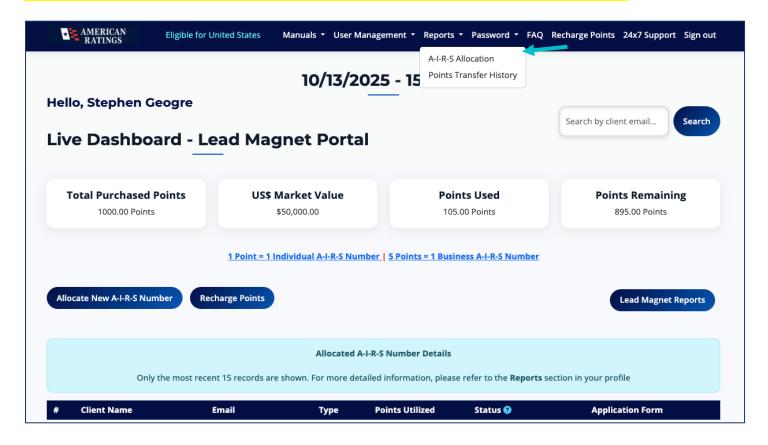
Purpose: To understand the functionality and operation of the Lead Magnet Points Transfer Report.

Path: Dashboard \rightarrow Reports Dropdown \rightarrow Points Transfer History

Steps (Refer to Screen 9.1 to 9.3 below):

- 1. Click on Report and select Lead Magnet Points Transfer History. (Step 1 on Screen 9.1 below)
- 2. The Report Screen will appear. Enter the required details such as User / Channel Partner, Transaction Type (Credit/Debit), Start Date, and End Date, then click Generate Report. (Step 2 on Screen 9.2 below)
- 3. The system will generate the Points Transfer History Report based on the provided inputs, which can be downloaded in PDF format for internal use. (Step 3 on Screen 9.3 below)

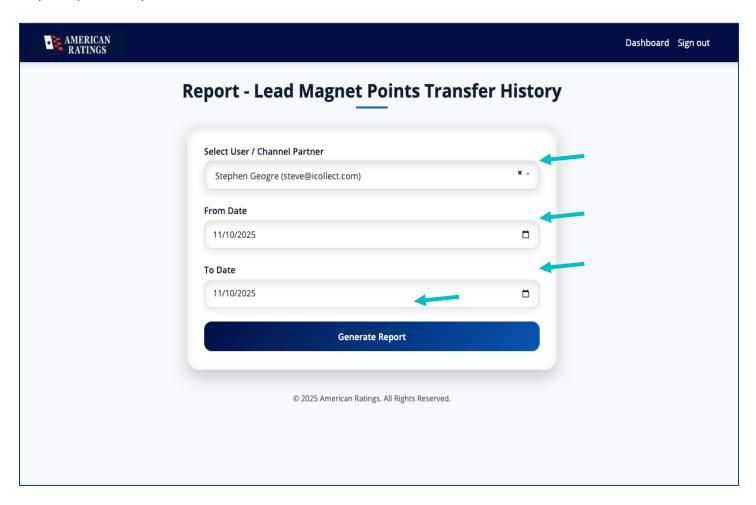
Screen 9.1 – Points Transfer History Report (Steps shown below to correspond to this screen)





Screen 9.2 – Points Transfer History screen is displayed based on the respective user credentials. (The steps shown below correspond to this screen.)

Note – The given credentials are for illustration purposes only. You can select the required fields based on your specific requirements.





Screen 9.3 - The report will be generated and can be downloaded in PDF format for internal use.

Report – Lead Magnet Points Transfer History

Selected Email: steve@icollect.com | From: 2025-10-11 | To: 2025-10-11



#	Person Name	User Email	Points	Transfer Status	Transfer Date
1	Stephen Geogre	roger@gmail.com	100	Success	2025-10-11 12:42:38

Total Points Transferred on this page: 100

Grand Total Points Transferred: 100

Page 1 of 1

--- End of Report ---



➤ Understanding the A-I-R-S Allocation Report (Screen 8)

The A-I-R-S Allocation Report provides a detailed overview of how applications are allocated to users or channel partners within the Lead Magnet Portal.

It helps administrators and team members track submission progress, monitor status updates, and verify which user or partner is handling a specific application.

Key Highlights:

- Enables real-time tracking of application allocations and statuses.
- Helps in monitoring performance across users or partners.
- Assists management in ensuring transparency and accountability in the allocation process.
- Can be used for internal review and record-keeping through downloadable PDF reports.

Understanding the Points Transfer History Report (Screen 9)

The Points Transfer History Report displays all transactions related to the transfer of points between users and channel partners.

It provides a transparent view of credit and debit entries, helping in managing and auditing incentive programs efficiently.

Key Highlights:

- Shows complete transaction history, including points credited and current balance.
- Supports filtering by date, user, and transaction type for focused analysis.
- Allows administrators to verify reward activities and prevent discrepancies.
- The report can be exported in PDF format for internal tracking and compliance.



➤ Screen 10 – General Navigation Guide

Purpose: Navigate key menu options within the Lead Magnet Portal.

Menu Option	Purpose
Password	Change or reset your login password.
FAQ	Access frequently asked questions.
Recharge Points	Add new Lead Magnet Points to your account.
24x7 Support	Contact support team anytime.
Sign Out	Securely exit the portal.

Note: Always log out after completing your session to maintain data security.